Introduction

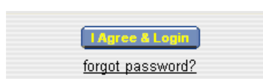
The purpose of this document is to highlight the differences between Release 2 and Release 3 of the ePMA application. This document will focus on the software changes and improvements that have been implemented in Release 3 of ePMA.

Changes and improvements were made in the following functional areas:

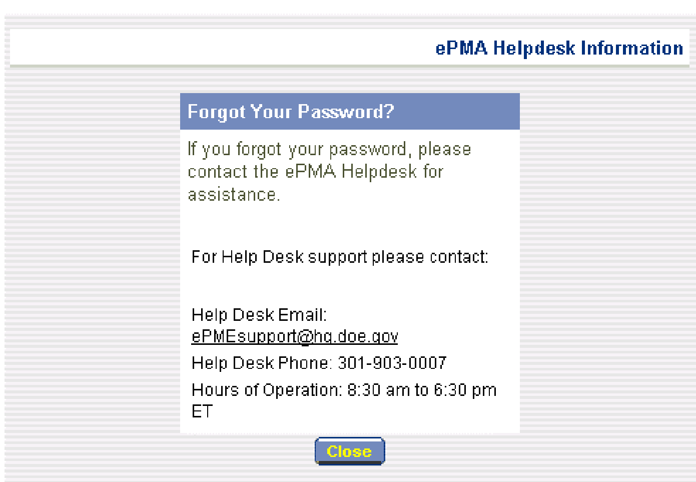
- User Login
- Recent Tasks List
- Task List
- Setup Team
- Custom Views
- Task Details Page
- Proposal Details Page
    - The Proposal Details section covers Menu Bar changes, the Guidance Tab, EE-related fields and New Proposal fields
- Copy Proposal
- Improved Workflow

User Login

In Release 3 of ePMA, there is a "forgot password?" link available on the User Login Screen, just below the "I Agree & Login" pushbutton.

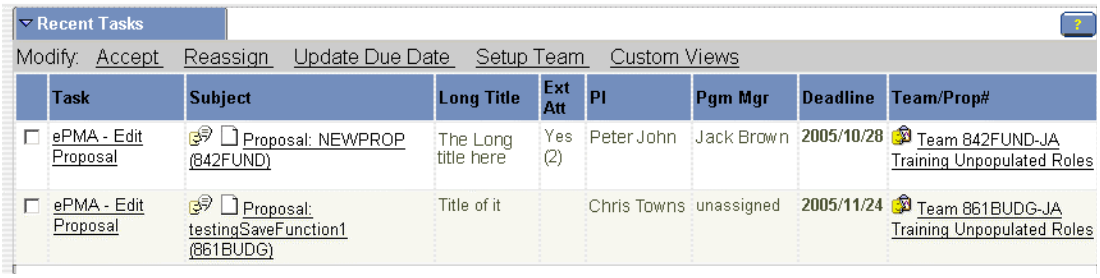


This link will aid users who need help logging into the ePMA application. When a user clicks on the "forgot password?" link, a popup screen presents ePMA Helpdesk Information as show below:



Recent Tasks List

Several changes have been implemented that pertain to the elements and layout of the ePMA Task List. The Recent Tasks table has been modified as seen below. New columns have been added as follows: Long Title, Ext Att (External Attachments), PI, and Pgm Mgr (Program Manager). Also note that two new functions have been added to the Recent Tasks Modify bar: Setup Team (for multiple proposals) and Custom Views.



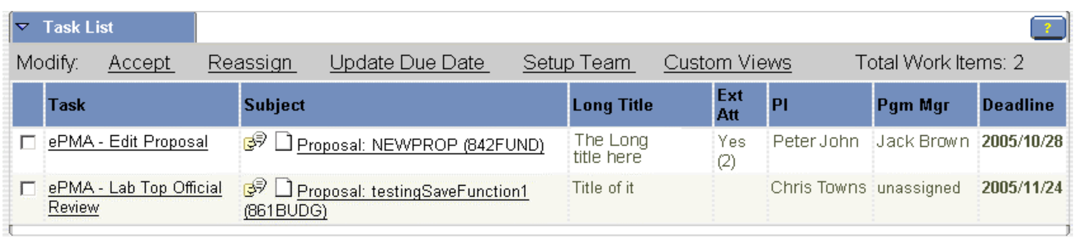
Recent Tasks

Modify: Accept Reassign Update Due Date Setup Team Custom Views

	Task	Subject	Long Title	Ext Att	PI	Pgm Mgr	Deadline	Team/Prop#
☐	ePMA - Edit Proposal	Proposal: NEWPROP (842FUND)	The Long title here	Yes (2)	Peter John	Jack Brown	2005/10/28	Team 842FUND-JA Training Unpopulated Roles
☐	ePMA - Edit Proposal	Proposal: testingSaveFunction1 (861BUDG)	Title of it		Chris Towns	unassigned	2005/11/24	Team 861BUDG-JA Training Unpopulated Roles

Task List

The Task List feature has also been enhanced to include new columns. New columns have been added as follows: Long Title, Ext Att (External Attachments), PI, and Pgm Mgr (Program Manager). Two new functions have been added to the Task List Modify bar: Setup Team (for multiple proposals) and Custom Views links. Additionally, a Total Work Items count has been added to the Modify bar as well.



Task List

Modify: Accept Reassign Update Due Date Setup Team Custom Views Total Work Items: 2

	Task	Subject	Long Title	Ext Att	PI	Pgm Mgr	Deadline
☐	ePMA - Edit Proposal	Proposal: NEWPROP (842FUND)	The Long title here	Yes (2)	Peter John	Jack Brown	2005/10/28
☐	ePMA - Lab Top Official Review	Proposal: testingSaveFunction1 (861BUDG)	Title of it		Chris Towns	unassigned	2005/11/24

Setup Team for Multiple Proposals

The Setup Team task may now be performed for multiple proposals at once. To use this feature, the user must be in the Recent Tasks, or the Task List screen. Begin by checking the box next to the proposal(s) you are authorized to modify team members for, and click the “Setup Team” link. The user will then follow the standard Setup Team procedure for assigning team members. When the user selects “Save Team”, the team members chosen are assigned to the teams of each proposal selected in the Task List.

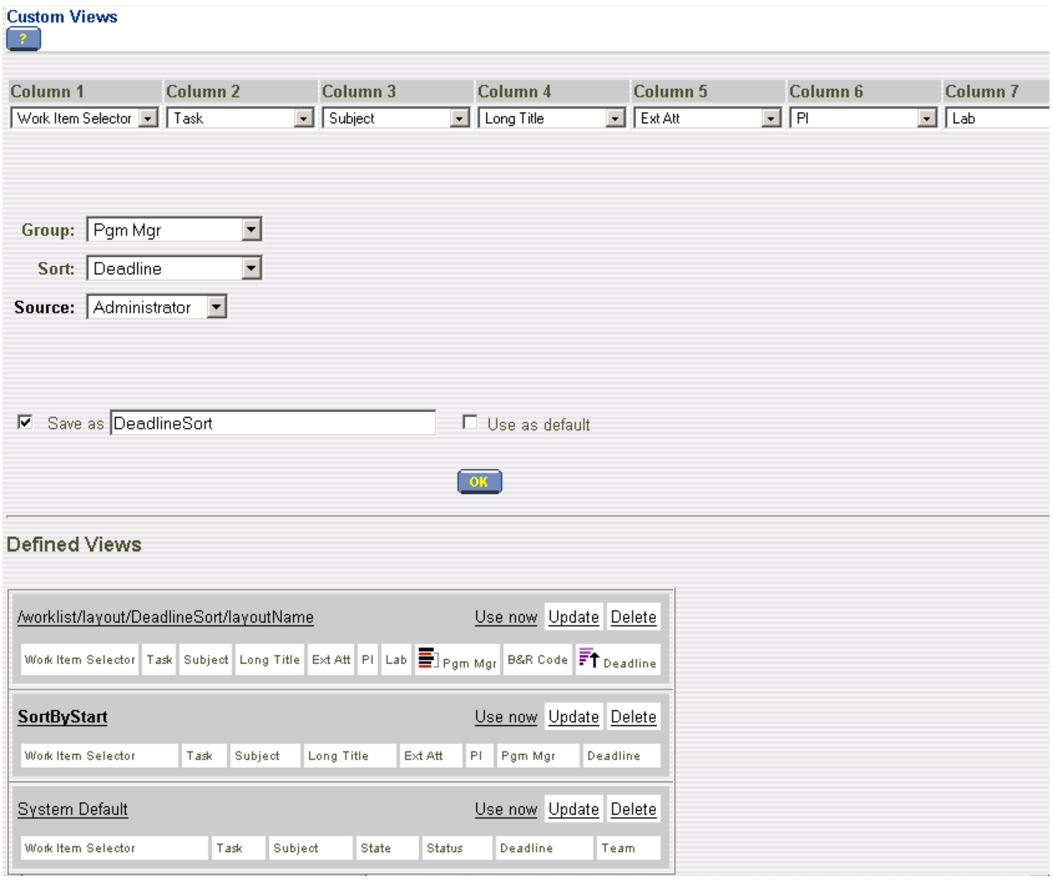
At the Laboratory organizational level, there is no longer an explicit Setup Team task. The Setup Team task is subsumed under the ePMA – Edit Proposal task.

At the Headquarters organizational level, additional Headquarters Top Officials and Internal Budget Reviewers can be included in the workflow for proposal review. (See the Improved Workflow section for a listing of all the changes to the workflow.)

Custom Views

In Release 3, the Custom Views functionality will allow users to display their Task Lists in any combination of columns (attributes) that they find useful when viewing the task list. The custom Task Lists can also be sorted and grouped by the selected columns. These views can be saved and used at a later time or used just once.

To access the Custom Views screen, the user will click on the "Custom Views" link on the Modify bar of the Recent Tasks screen or on the Task List screen. The following screen is displayed:



Note that you may select one column for grouping and one column for sorting.

Available column choices include:

- Work Item Selector (checkbox)
- Task
- Subject
- State
- Priority
- Deadline
- Team

- Owner
- Process
- Long Title
- Activity Start
- Ext Att (External Attachment)
- PI
- Pgm Mgr (Program Manager)
- Lab
- B&R Code

For detailed information regarding Custom Views, please refer to the online help available from this screen for this functionality.

Task Details Page

In Release 3, users now have the ability to save Internal Comments and Instructions at any time, without completing the task, by using the "Save Internal Comments" button located at the bottom of the Task Details screen, as referenced below:

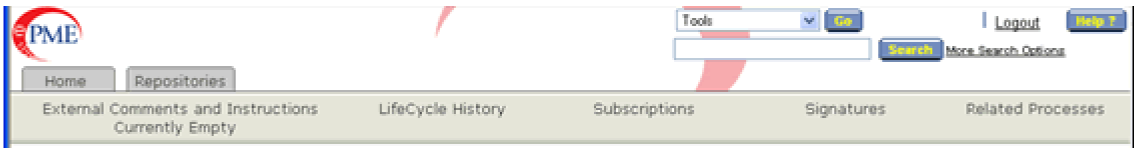
Proposal Details

Several changes and enhancements have been implemented on the Proposal Details screen.

Proposal Details – Menu Bar

On the Proposal Details menu bar located at the top of the screen, the LifeCycle History menu option has been removed. Review the figures below:

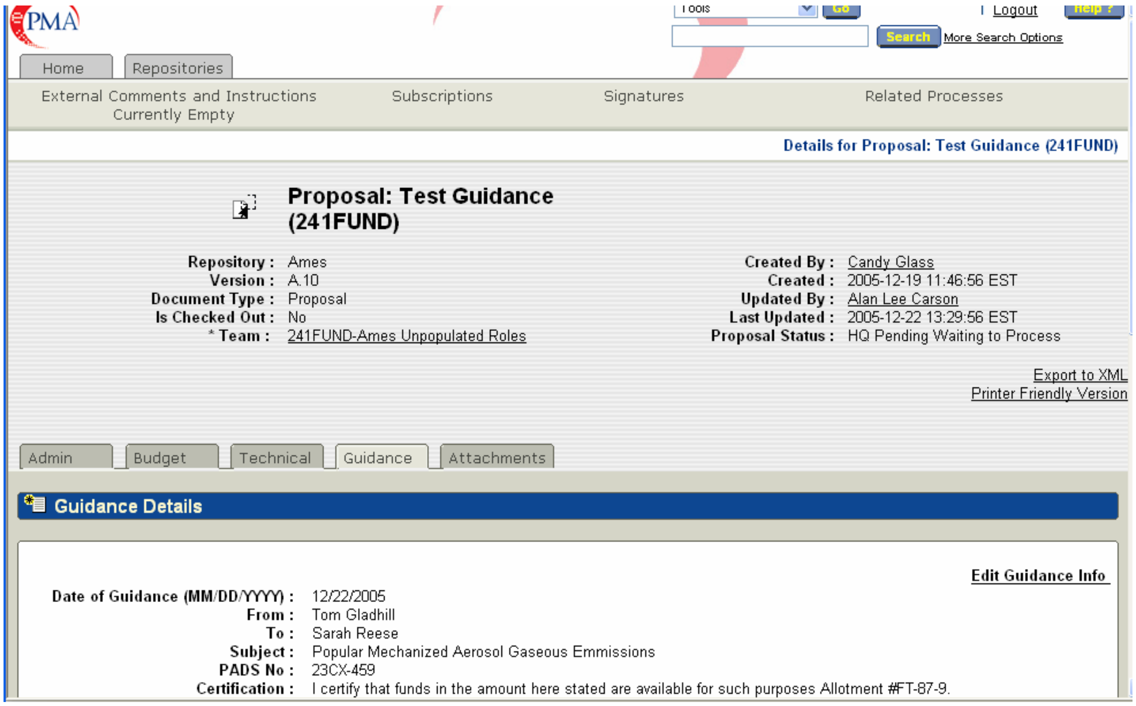
Release 2



Release 3

Proposal Details – Guidance Tab

Proposals may now include Guidance that is optionally attached to the proposal at the Headquarters organizational level. Upon creation, the Guidance tab will not be visible. However, the Guidance is available at the Headquarters organizational level and can be viewed by clicking on the Guidance tab as seen below.



The Guidance will be editable and visible at the Headquarters organizational level, prior to proposal approval. Once a proposal has been approved, the Guidance is viewable at all organizational levels, but may no longer be edited.

Proposal Details – EE related fields

The office of Energy Efficiency and Renewable Energy (EERE) will be utilizing ePMA for a portion of their Agreement creation and negotiating processes. In order for ePMA to be an effective vehicle for Agreement management, many fields were added that exclusively pertain to EE.

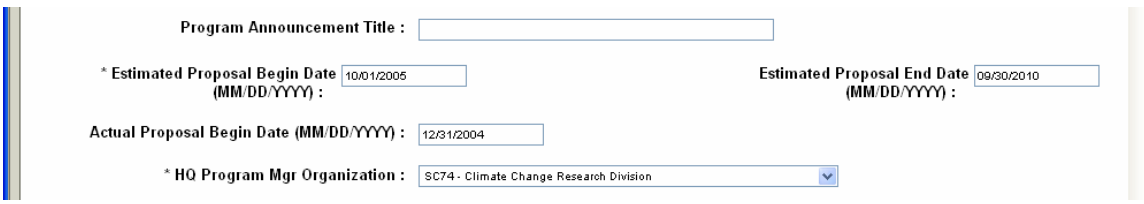
EE-related fields have been added to all categories of data within ePMA: Administrative, Budget and Technical. These fields are available, and may be utilized by all users of ePMA, but are actually intended for EE users who are creating or updating Agreements. The table below details the EE-related fields that have been added to ePMA. Fields are listed by data category:

Category of Data	**Fields**
Administrative	Proposal Purpose (must equal 'Agreement') Project ID (required) Competitive? AOP Short Description Agreement Status Award Type Award Number CID Number Additional Contacts CPS FWP Number Sub Awardee Sub Awardee Contact Sub Contract Short Title Sub Contract Type Sub Contract Title Sub Contract Start Date Sub Contract Complete Date Identifier Amount In Cash (In Kind)
Budget	Prime Awardee Cost Share Identifier Prime Awardee Cost Share Amount In Cash (In Kind)
Technical	Milestone Type Milestone Status Status Text Lead Field POC Importance

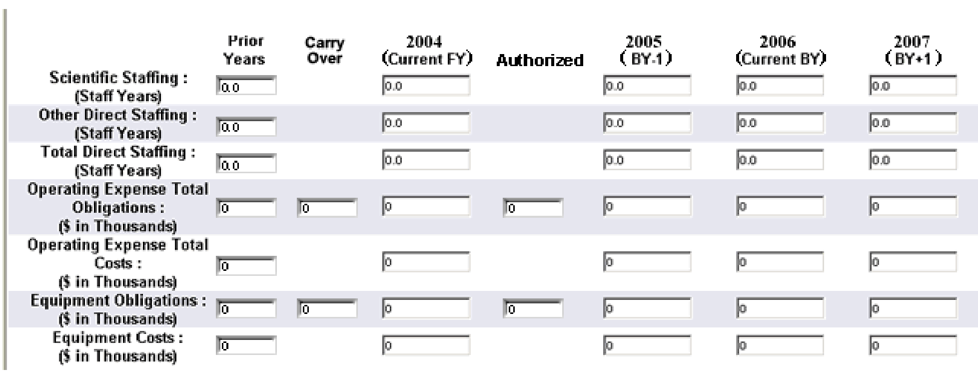
Proposal Details – New Proposal Fields

Several new fields are available to all users of ePMA when creating and updating proposals. All added fields are optional and are not necessary for proposal creation, but are intended to provide additional information for that proposal.

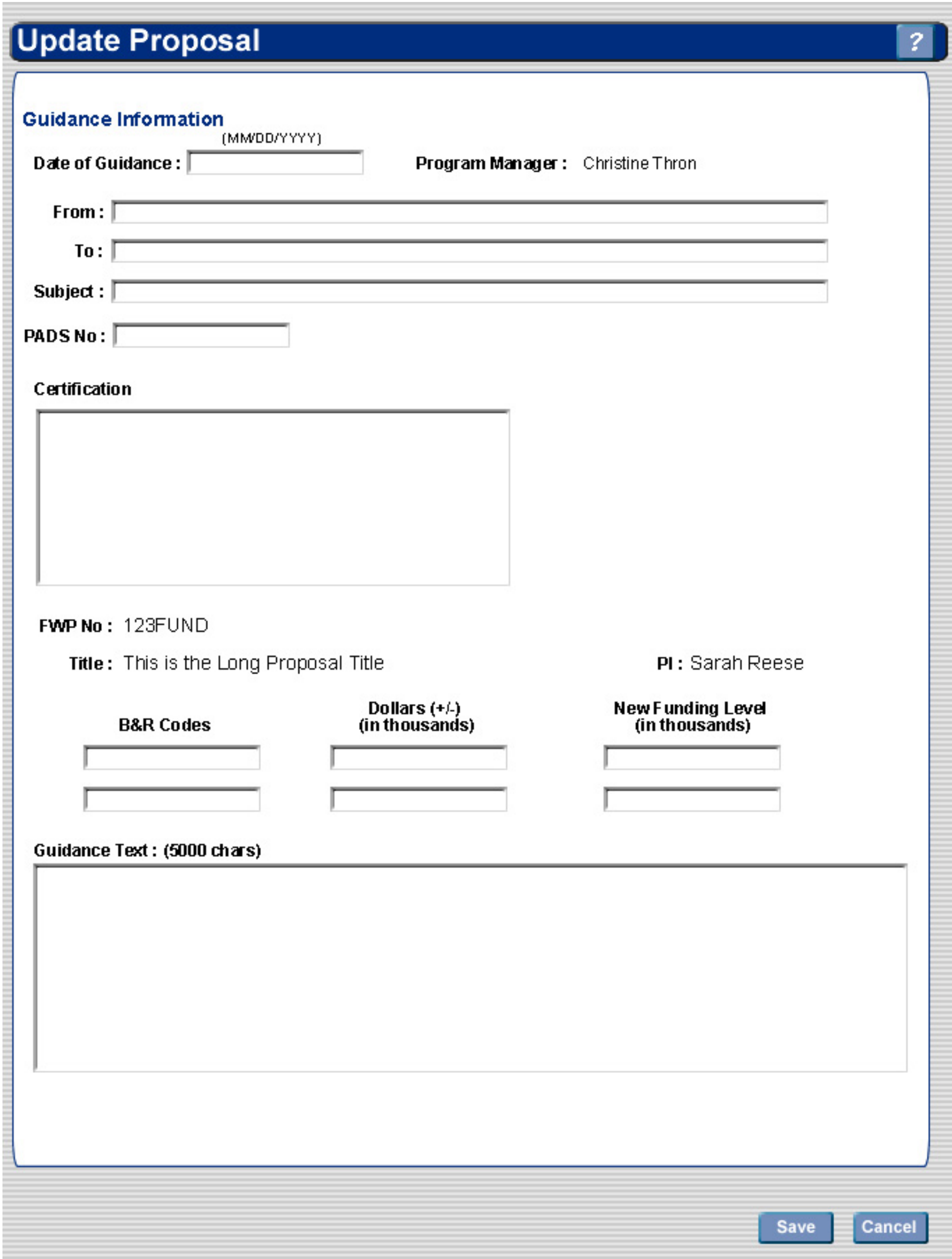
In the Administrative category of data, the field Actual Proposal Begin Date is available for entry. The Actual Proposal Begin Date is the date on which the work encompassed by this proposal actually commenced. The field is located on the Administrative Details screen as referenced below:



In the Budget category of data, the Authorized fields are available for entry by Headquarters personnel only, except the HQ Administrator. The Authorized fields are the funding amounts being suggested for approval by headquarters personnel for the specific proposal. These fields are located on the Budget Details screen as referenced below:

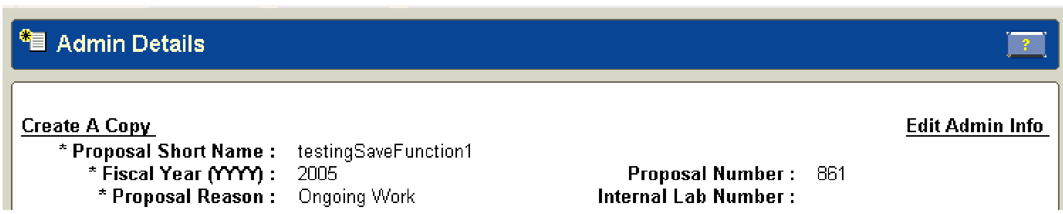


With the addition of the ability to create Guidance for a proposal, fields associated to Guidance are available for entry and update by Headquarters personnel only. Some of the fields will be pre-populated based on entries in other categories of data. For example, the B&R Code appears on the Budget Details screen and is propagated to the Guidance screen (if entered). The Guidance screen is available via the Guidance tab on the Proposal Details screen. Upon clicking on the Guidance tab, then clicking the 'Edit Guidance Info' link, the following screen is presented:


Update Proposal
?
Guidance Information
(MM/DD/YYYY)
Date of Guidance :
Program Manager : Christine Thron
From :
To :
Subject :
PADS No :
Certification
FWP No : 123FUND
Title : This is the Long Proposal Title
PI : Sarah Reese
B&R Codes
Dollars (+/-) (in thousands)
New Funding Level (in thousands)
Guidance Text : (5000 chars)
Save
Cancel

Copy Proposal

Up to this point, a proposal could be created in ePMA by either entering data directly into a series of screens, referred to as forms-based proposal creation, or by uploading the proposal data directly into ePMA via the eIDK utility. With the deployment of Release 3, a new method has been implemented which will allow a user to copy an existing proposal for the purpose of creating a new proposal. This feature has been implemented by means of a "Create A Copy" link located on the left side of the Administrative Details screen as depicted below:



The ability to create a proposal is only available at the Laboratory level. When copying a proposal, every field of the existing proposal will be copied, except for external attachments. A new proposal number will also be assigned to the proposal.

Improved Workflow

The workflow for each of the organizational levels has been expanded and improved. The changes implemented will provide added flexibility when moving a proposal from role to role, as well as one organizational level to the next.

The table below details the changes to the workflow. Changes are listed by organizational level:

Organizational Level	Changes
Laboratory	• A proposal may be deleted before assigning a team. • The 'Setup Team' task has been removed. The ability to assign team members is now available through the 'ePMA – Edit Proposal' task. • The Lab Admin, PI and Budget Reviewer may send a proposal for additional review. All reviewers must concur in order for the proposal to advance to the next person in the workflow. • The Budget Reviewer now sends the proposal directly to the Top Official without having to send it back to the PI for additional edits. • The Guidance tab is not visible at the lab until the proposal has been approved by Headquarters.
Site Office	• A proposal may be returned to the Lab before assigning a team. • The Budget Reviewer may send a proposal for

	additional review. All reviewers must concur in order for the proposal to advance to the next person in the workflow. • The Guidance tab is not visible at the Site Office until the proposal has been approved by Headquarters.
Headquarters	• A proposal may be returned to the Lab before assigning a team. • The Program Manager: a. May send a proposal for additional review. If all reviewers concur, the proposal advances to the Top Official in the workflow. b. May send a proposal to Internal Budget Reviewer(s) for additional review. The proposal is returned to the Program Manager when the reviewers complete their review. c. No longer has the ability to Approve or Decline a proposal; these options have been replaced with 'Recommend for Funding' and 'Recommend for Decline' • The Top Official may send a proposal to other Top Officials for additional review. • Upon declination of the proposal, the Top Official can enter text into the *Internal* Comments and Instructions text area on the Task Details page and that text will be incorporated into the body of the email declination notification. • The Headquarters Budget Reviewer is the end point of the workflow. • Authorized funding dollars can be entered by all Headquarters personnel, except the Admin. • A budget call proposal may be 'closed out' by the Program Manager via the 'Received and Reviewed' radio button. • Guidance is editable by all Headquarters personnel, except the Admin.